



Filing ID #10021836

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Kathleen Allen
Status: Congressional Candidate
State/District: GA07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/8/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Allen Family Bank Accounts ⇒ Bank of America Accounts [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Allen Family Bank Accounts ⇒ First Tech Bank Accounts [BA]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Allen Family Bank Accounts ⇒ Georgia United Credit Union Accounts [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Allen Family Bank Accounts ⇒ Regions Bank Accounts [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Ameriprise ONE Financial Account ⇒ ACC Cash Reserve ONE [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Annalisa Allen 529 ⇒ FDIC-Insured Accounts [BA]	DC	\$1 - \$1,000	Tax-Deferred		
Annalisa Allen 529 ⇒ Vanguard Developed Markets Index [5P]	DC	\$1 - \$1,000	Tax-Deferred		
LOCATION: UT					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Annalisa Allen 529 ⇒ Vanguard Emerging Mkt Stock Index [5P] LOCATION: UT	DC	\$1 - \$1,000	Tax-Deferred		
Annalisa Allen 529 ⇒ Vanguard Short-Term Bond Index [5P] LOCATION: UT	DC	\$1 - \$1,000	Tax-Deferred		
Annalisa Allen 529 ⇒ Vanguard Short-Term Invest Grade [5P] LOCATION: UT	DC	\$1 - \$1,000	Tax-Deferred		
Annalisa Allen 529 ⇒ Vanguard Total Bond Market Index [5P] LOCATION: UT	DC	\$1 - \$1,000	Tax-Deferred		
Annalisa Allen 529 ⇒ Vanguard Total Stock Market Index [5P] LOCATION: UT	DC	\$1 - \$1,000	Tax-Deferred		
Cooper Allen 529 ⇒ FDIC-Insured Accounts [5P] LOCATION: UT	DC	\$1 - \$1,000	Tax-Deferred		
Cooper Allen 529 ⇒ Vanguard Developed Markets Index [5P] LOCATION: UT	DC	\$1 - \$1,000	Tax-Deferred		
Cooper Allen 529 ⇒ Vanguard Emerging Mkt Stock Index [5P] LOCATION: UT	DC	\$1 - \$1,000	Tax-Deferred		
Cooper Allen 529 ⇒ Vanguard Short-Term Bond Index [5P] LOCATION: UT	DC	\$1 - \$1,000	Tax-Deferred		
Cooper Allen 529 ⇒ Vanguard Short-Term Invest-Grade [5P] LOCATION: UT	DC	\$1 - \$1,000	Tax-Deferred		
Cooper Allen 529 ⇒ Vanguard Total Bond Market Index [5P] LOCATION: UT	DC	\$1 - \$1,000	Tax-Deferred		
Cooper Allen 529 ⇒	DC	\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Total Stock Market Index [5P]					
LOCATION: UT					
ERIC DOUGLAS ALLEN IRA ⇒ ACC Cash Reserve IRA [IH]	SP	\$100,001 - \$250,000	Tax-Deferred		
ERIC DOUGLAS ALLEN SEP IRA ⇒ ACC Cash Reserve SEP IRA [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		
Kathleen Allen KP Pensions ⇒ Physicians and Employees Retirement Plan [PE]		Undetermined	Tax-Deferred		
DESCRIPTION: Value determined at retirement.					
Kathleen Allen KP Pensions ⇒ Salaried Retirement Plan-Plan A [PE]		Undetermined	Tax-Deferred		
DESCRIPTION: Value determined at retirement.					
Kathleen Allen KP Tax Sheltered Annuity Plan ⇒ Alger Capital App Fd Cl Z [MF]		\$50,001 - \$100,000	Tax-Deferred		
Kathleen Allen KP Tax Sheltered Annuity Plan ⇒ KP Retirement Path 2035 [MF]		\$15,001 - \$50,000	Tax-Deferred		
Kathleen Allen KP Tax Sheltered Annuity Plan ⇒ KP Small Cap Equity I [MF]		\$15,001 - \$50,000	Tax-Deferred		
Kathleen Allen KP Tax Sheltered Annuity Plan ⇒ TRP Intl Disc I Cl [MF]		\$15,001 - \$50,000	Tax-Deferred		
Kathleen Allen KP Tax Sheltered Annuity Plan ⇒ Vanguard International Growth Adm [MF]		\$15,001 - \$50,000	Tax-Deferred		
Kathleen Allen KP Tax Sheltered Annuity Plan ⇒ Vanguard Ist Tt St Mk Idx Ist Plus [MF]		\$15,001 - \$50,000	Tax-Deferred		
Kathleen Allen KP Tax Sheltered Annuity Plan ⇒ Vanguard Wellington Fund Admiral [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
KATHLEEN H ALLEN IRA ⇒ Columbia Corporate Income Instl CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ Columbia Select Large Cap Growth Instl CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ Dreyfus Govt Cash Mgmt FDS Instl Shs 289 [IH]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ INVESCO BALANCED RISK COMMODITY STRAT CL Y [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ ISHARES 1-3 YR TREASURY BOND ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ ISHARES 1-3 YR TREASURY BOND ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ ISHARES 20+ YR TREASURY BOND ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ ISHARES 3-7 YR TREASUREY BOND ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ ISHARES CORE MSCI EMERGING MARKETS ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ ISHARES CURRENCY HEDGED MSCI EUROZONE ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ ISHARES MSCI JAPAN ETF NEW [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ JANUS HENDERSON U S MANAGED VOLATILITY CL I [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ JOHN HANCOCK CLASSIC VALUE CL I [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
KATHLEEN H ALLEN IRA ⇒ JOHN HANCOCK STRATEGIC INCOME OPPTYS CL I [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ JOHN HANCOCK U S GLOBAL LEADERS GROWTH CL I [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ LEGG MASON BW ABSOLUTE RETURN OPPTYS CL I [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ OPPENHEIMER GLOBAL VALUE CL Y [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ PRINCIPAL GLOBAL REAL ESTATE SECURITIES INSTL CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ VANGUARD MORTGAGE BACKED SECURITIES ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ VANGUARD SHORT TERM CORP BOND ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ VANGUARD SMALL CAP ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ VANGUARD SMALL CAP VALUE ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ VANGUARD VALUE ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ WELLS FARGO INTL VALUE INSTL CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ WESTERN ASSET CORE PLUS BOND CL I [MF]		\$1,001 - \$15,000	Tax-Deferred		
KATHLEEN H ALLEN IRA ⇒ X TRACKERS MSCI JAPAN HEDGED		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
EQUITY ETF [MF]					
Kathleen KP Supplemental Ret Plan B ⇒ KP Retirement Path 2035 Fund Institutional Shares [MF]		\$15,001 - \$50,000	Tax-Deferred		
Tinnaeus, Inc., 100% Interest [OL]	SP	\$100,001 - \$250,000	Shareholder Distributions	\$50,001 - \$100,000	\$100,001 - \$1,000,000
LOCATION: Norcross/Gwinnett, GA, US DESCRIPTION: Software development.					

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Kaiser Foundation Health Plan	Kathleen Salary	\$31,220.00	\$89,000.00
Tinnaeus, Inc.	Spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Officer - President	Paid In America, Inc.
Board member - Board of Directors	PCCI, Project Community Connections, Inc.
COMMENTS: 501c(3) nonprofit organization	
Employee	Kaiser Foundation Health Plan, Inc.
COMMENTS: KFHP Employee	

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Allen Family Bank Accounts (Owner: JT)
LOCATION: US
- Ameriprise ONE Financial Account (Owner: JT)
LOCATION: US
- Annalisa Allen 529 (Owner: DC)
LOCATION: UT
DESCRIPTION: Gramma Margy invested for kid.
- Cooper Allen 529 (Owner: DC)
LOCATION: UT
DESCRIPTION: Gramma Margy invested for kid.
- ERIC DOUGLAS ALLEN IRA (Owner: SP)
- ERIC DOUGLAS ALLEN SEP IRA (Owner: SP)
- Kathleen Allen KP Pensions
LOCATION: US
DESCRIPTION: Value Determined at Retirement
- Kathleen Allen KP Tax Sheltered Annuity Plan
- KATHLEEN H ALLEN IRA
- Kathleen KP Supplemental Ret Plan B

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Kathleen Allen , 05/8/2018